

FACULTY SEARCH TRAINING GUIDE FOR COMMITTEE MANAGER

School of Medicine & Dentistry

Welcome to UR Faculty, our new comprehensive Faculty Information System! This training guide covers the Faculty Search module of UR Faculty, focusing on the role of a Committee Manager.

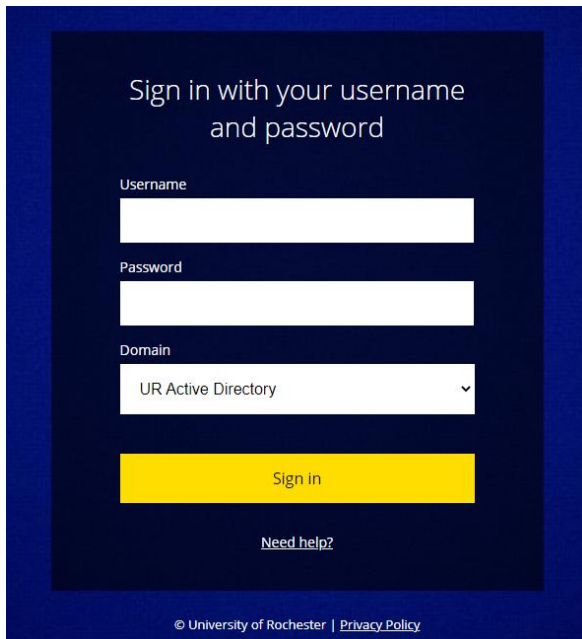
Note: You must be included the FIS Faculty Search database in order to access Faculty Search. If you are a Committee Manager on a search committee and do not have access, please send an email to URFacultyHelp@rochester.edu and include:

- Full name
- Email address
- URID, if possible
- School/department
- Role (Administrator/Committee Manager/Evaluator)

For information on role definitions and permission levels, see Interfolio's help site: https://product-help.interfolio.com/en_US/managing-users/user-roles-in-interfolio-faculty-search

SIGN IN

- Access Interfolio at: https://iam-api.interfolio.com/users/sso_redirect?tenant_id=16224
- Fill out your username and password (SSO login credentials for University of Rochester) and select the appropriate domain
- Click on "Sign in"



Sign in with your username
and password

Username

Password

Domain
UR Active Directory ▾

Sign in

[Need help?](#)

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EDIT AN EXISTING POSITION

EDIT POSITION

- **Note:** After a position has been approved, the Office of Academic Affairs will receive email notifications for position edits.
- From the FIS home screen, click on “Positions” on the left menu
- Click on the position from the list of positions displayed

Home
Faculty Search
Positions
Templates
Administration
Reports
Users & Groups

Positions

Search for positions

Position: Assistant Professor | Status: Accepting Applications | Application Information: 0 applications, Opens: Apr 26, 2023 | EEO Notes: Add

University of Rochester | Faculty | ID:115085

+ New Position

- Click on “Position Actions” at the top right corner and select “Edit Position”

Assistant Professor

Unit: University of Rochester | Status: Accepting Applications | Opens: Apr 26, 2023 | Closes: No date set

Applicants

Search by name, education, or status

Applicant Name | Date Updated | Applicant Status | Tags | My Overall Rating

No results returned by the selected filters.

Position Actions
Edit Position
View Committee
View Position Activity Log
View position details
View Referral Sources
Add New Applicant
Close Position
Delete Position

- Under the “Edit Position” menu on the right side, select the section you want to edit.

Position Summary

THIS POSITION IS: **Open to New Applicants**

Open Date: 4/26/2023

Deadline: Rolling Deadline Specific Date

POSITION ADVERTISING: "Apply Now" page is not published

PUBLISH

URL: The position must be published to activate the URL.

POSITION STATUS: **Accepting Applications**

With this status active:

- Applicants **can** view this status.
- Applicants **can** update their application materials.
- Evaluators **can** review applications to this position.

change

EDIT POSITION...

1. Basic Information
2. Required Documents
3. Evaluation Settings
4. Application Forms
5. Search Committee
6. Position Notes

For more information on editing an existing position, see Interfolio’s help site: https://product-help.interfolio.com/en_US/creating-and-managing-positions/edit-an-existing-position

SETTING A USER'S PERMISSION LEVEL









- **Committee Managers and Administrators can set the permission level of users in their unit and below. By default, users have the permission level of an Evaluator. If you are trying to add another user as a Committee Manager but do not see their name as a selectable option when creating/editing a search committee, you will need to assign that user a Committee Manager role.**
- **From the FIS home page left side menu, click on “Users & Groups”**

The screenshot shows the FIS home page interface. On the left, a navigation menu includes 'Home', 'Faculty Search', 'Positions', 'Templates', 'Administration', 'Reports', and 'Users & Groups', which is highlighted with a green arrow. The main area displays a notification about the Interfolio Scholar Service Helpdesk being unavailable. Below this, there are two task counters: 'My Tasks' with 0 unread tasks and another counter with 0 read tasks. At the bottom, a message with a printer icon states 'Looks like you're all caught up. Nice.'

- **Click on the pencil icon on the right side of the desired user's name.**

Users, Units & Titles

The screenshot displays the 'Users, Units & Titles' management page. It features a search bar for users, a 'Download User list' button, and an 'Add User' button. Below is a table listing users with their roles and units. A green arrow points to the pencil icon in the 'Actions' column for the first user.

User ^	Role & Unit	Additional Permissions	Actions
Lynette Anderson l.anderson@rochester.edu	Administrator University of Rochester	-	
Richard A. Wilson richard.wilson@interfolio.com	Administrator University of Rochester	-	
Wendy Bradford wendy.bradford@rochester.edu	Administrator School of Medicine and Dentistry	-	
Richard Wilson richard.wilson@rochester.edu	Administrator Office of the Provost	-	
Tara Sullivan tara.sullivan@rochester.edu	Administrator College of Arts, Sciences & Engineering	-	
Cynthia Carlson cynthia.carlson@rochester.edu	Administrator University of Rochester	-	
Marissa Cavalli marissa.cavalli@rochester.edu	Administrator Simon Business School	-	
Charles DeWitt charles.dewitt@rochester.edu	Administrator University of Rochester	-	

- Under “Permissions”, click on “+ Add Role”

Edit User [X]

First Name * [Text Field] Last Name * [Text Field]

Email * [Text Field]

Single Sign On
 If checked, this user will need to sign on using their institutional credentials.

[Update] [Cancel]

Permissions SSO Identifier

Role
 A user's role determines their capabilities in the program. [Learn more about User Roles.](#)

Role	Unit	Actions
Administrator	University of Rochester	Remove

[+ Add Role] ←

Title
 A title can be assigned to the unit of the administrator's current role or a unit below. [Learn more about titles.](#)

Title	Unit	Actions
-------	------	---------

[+ Add Title]

[Options v]

- Select your unit from the drop down list and select the appropriate permission level under Role.
- Click “Save”

Edit User [X]

First Name * [Text Field] Last Name * [Text Field]

Email * [Text Field]

Single Sign On
 If checked, this user will need to sign on using their institutional credentials.

[Update] [Cancel]

Permissions SSO Identifier

Role
 A user's role determines their capabilities in the program. [Learn more about User Roles.](#)

Unit *
 Select a unit [Dropdown] ←

Role *
 Committee Manager [Dropdown] ←

[Save] [Cancel]

[Options v]

For more information on changing a user's role, see Interfolio's help site: https://product-help.interfolio.com/en_US/managing-users/change-a-users-role-or-delete-a-user-in-faculty-search

MANAGE A SEARCH

CHANGE POSITION STATUS

- From the FIS home screen, click on “Positions” on the left menu
- Click on the desired position from the list of positions displayed

Home
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Users & Groups

Positions

New Position

Search for positions

Position Status Application Information EEO Notes

Assistant Professor Accepting Applications 0 applications Opens: Apr 26, 2023 Add

University of Rochester Faculty ID:115085

- Under Status and next to the current position status, click “change”. Select the desired status.
- Select the desired position status and click “Confirm” on the pop-up window

Assistant Professor

Position Actions

Unit: University of Rochester FS/LM Test Site

Status: Accepting Applications **change**

Opens: Apr 26, 2023

Closes: No date set

Applicants

Search by name, education, or status

1 of 1 Applicants Shown.

Applicant Name	Applicant Status	Tags	My Overall Rating
Jane Doe M.A. - Master of Arts, University of Rochester	Complete	05/01/23 01:16 PM EDT	☆☆☆☆

Change Status

Please confirm you wish to change the status of this position to **Reviewing Applications**.

WITH THIS STATUS ACTIVE:

- Applicants **can** view this status.
- Applicants **can** update their application materials.
- Evaluators **can** review applications to this position.

Send a message to all applicants with this change

Confirm Cancel

FILTER APPLICANT POOL

- The list of applications can be filtered by data points including highest degree earned, application status, tags, completion status, ratings, or form responses
- Click “Filter” and apply desired filters
- The filtered view can be saved by clicking “Save” or cleared by clicking “Clear Filters”

Assistant Professor

Position Actions ▾

Unit University of Rochester FS/LM Test Site	Status Reviewing Applications change	Opens Apr 26, 2023	Closes No date set
--------------------------------------------------------	----------------------------------------------------------------	------------------------------	------------------------------

Applicants

Search by name, education, or status



Filter ▾

Saved Views ▾

COLUMNS

M.A. - Master of Arts ✕ [Save](#) [Clear Filters](#)

HIGHEST DEGREE EARNED: <input checked="" type="checkbox"/> M.A. - Master of Arts	APPLICATION STATUS: No choices available.	TAGS: No choices available.	PROGRESS: <input type="checkbox"/> Complete
			RATINGS: <input checked="" type="radio"/> My Rating ☆☆☆☆☆ No Rating
			ARCHIVED: <input type="radio"/> Yes <input checked="" type="radio"/> No
Filter by Form Responses			

USE TAGS TO MARK & SORT APPLICATIONS

- Tags are used to help sort, categorize, and quickly identify applications. Tags are visible to other committee members.
- On the applicant’s profile under “Tags” click “+ Add” to add a tag.
- Alternatively, tags can also be added in bulk from the position page.

Jane Doe

Actions ▾

Education Information

M.A., University of Rochester

Status

n/a [Change](#)

Disposition Code [+](#) [Add](#)

Tags

[strong publications](#) [+](#) [Add](#)

Application [Complete](#) [Add File](#) [Read](#)

Documents

Title	Date	Actions
C.V. C.V.	May 1, 2023	Download
Cover Letter Uncategorized	May 9, 2023	Download
Creative Work Creative Work	May 1, 2023	Download

Forms

University Base Application Form
20 Questions

EMAIL APPLICANT(S)

- From the FIS home screen, click on “Positions” on the left menu
- Click on the position from the list of positions displayed

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Users & Groups

Positions

Search for positions

Position: Assistant Professor
Status: Accepting Applications
Application Information: 0 applications
EEO Notes: Add

University of Rochester | Faculty | ID:115085
Accepting Applications
Opens: Apr 26, 2023

New Position

- Names of applicants who applied for the position will appear on this position page. Select the checkbox next to the desired applicant(s).
- A red horizontal menu bar will appear. Click on “Email”
- Fill out the information on the pop-up window and click “Send”

Assistant Professor

Unit	Status	Opens	Closes
University of Rochester FS/LM Test Site	Reviewing Applications change	Apr 26, 2023	No date set

Applicants

Search by name, education, or status

1 of 1 Applicants Shown.

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input checked="" type="checkbox"/> Jane Doe M.A. - Master of Arts, University of Rochester	05/01/23 01:16 PM EDT			☆☆☆☆

READ EMAIL STATUS TAG + DISPOSITION CODE DOWNLOAD ARCHIVE

Complete

- Alternatively, to email a singular applicant, you can also click on the applicant’s name to see the applicant’s profile. Then click “Actions” from the top right menu, and click “Email applicant”.

Jane Doe

Education Information
M.A., University of Rochester

Status
n/a [Change](#)

Disposition Code [+ Add](#)

Tags [+ Add](#)

Application [Complete](#) [Add File](#) [Read](#)

Actions

- Share application
- Email applicant
- Download Application PDF
- Download Application ZIP
- Mark application incomplete
- Request recommendation
- Send to Appointment Management (a...)

REQUEST LETTER OF RECOMMENDATION ON BEHALF OF AN APPLICANT

- From the applicant's profile, click "Actions" from the top right menu, and click "Request recommendation"

Jane Doe

Education Information

M.A., University of Rochester

Status

n/a [Change](#)

Disposition Code [+](#) [Add](#)

Tags

[+](#) [Add](#)

Actions 

- Share application
- Email applicant
- Download Application PDF
- Download Application ZIP
- Mark application incomplete
- Request recommendation**
- Send to Appointment Management (a...

Application

[Complete](#) [+ Add File](#) [Read](#)

Documents

Title ^	Date ↕	Actions
C.V. C.V.	May 1, 2023	Download
Cover Letter Cover Letter	May 1, 2023	Download
Creative Work Creative Work	May 1, 2023	Download

Forms

[University Base Application Form](#)
20 Questions

- Fill out the recommendation request page and click "Send"

SET STATUS TO HIRED

- Once an applicant has been selected to hire, go to the applicant's profile and under Status, click on "change"
- Set the status to "hired"

Jane Doe

Education Information

M.A., University of Rochester

Status

n/a [Change](#)

Disposition Code [+](#) [Add](#)

Tags

[+](#) [Add](#)

Actions 

- Share application
- Email applicant
- Download Application PDF
- Download Application ZIP
- Mark application incomplete
- Request recommendation
- Send to Appointment Management (a...

Application

[Complete](#) [+ Add File](#) [Read](#)

Documents

Title ^	Date ↕	Actions
C.V. C.V.	May 1, 2023	Download
Cover Letter Cover Letter	May 1, 2023	Download
Creative Work Creative Work	May 1, 2023	Download

APPLY DISPOSITION CODES

- From the FIS home screen, click on “Positions” on the left menu
- Click on the position from the list of positions displayed

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Positions

New Position

Search for positions

Position Status Application Information EEO Notes

Assistant Professor	Accepting Applications	0 applications Opens: Apr 26, 2023	Add
University of Rochester Faculty ID:115085			

- On the position page, select the checkbox next to the desired applicant(s) name.
- A red horizontal menu bar will appear. Click on “Disposition Code”

Assistant Professor

Position Actions

Unit	Status	Opens	Closes
University of Rochester FS/LM Test Site	Reviewing Applications change	Apr 26, 2023	No date set

Applicants

Search by name, education, or status

1 of 1 Applicants Shown.

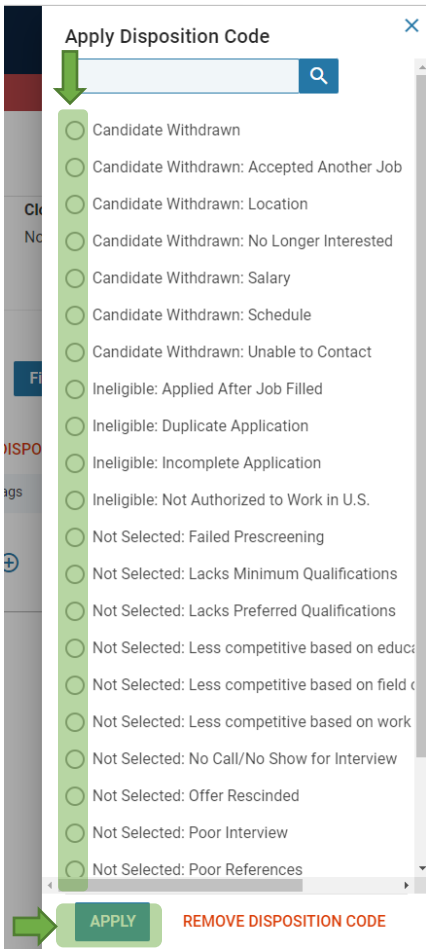
Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input checked="" type="checkbox"/> Jane Doe M.A. - Master of Arts, University of Rochester	05/01/23 01:16 PM EDT			☆☆☆☆☆

Filter Saved Views COLUMNS

READ EMAIL STATUS TAG + DISPOSITION CODE DOWNLOAD ARCHIVE

Complete

- **Select the desired disposition code and click “Apply”**



- **Alternatively, to apply a disposition code to a singular applicant, you can also click on the applicant’s name to see the applicant’s profile. Then next to Disposition Code, click “+ Add”**

ARCHIVE OR UNARCHIVE AN APPLICATION

- From the FIS home screen, click on “Positions” on the left menu
- Click on the position from the list of positions displayed

Home
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Positions

Search for positions

Position Status Application Information EEO Notes

Assistant Professor	Accepting Applications	0 applications Opens: Apr 26, 2023	Add
University of Rochester Faculty ID:115085			

New Position

- Select the checkbox next to the desired applicant(s) name.
- A red horizontal menu bar will appear. Click on “Archive”

Assistant Professor

Position Actions

Unit	Status	Opens	Closes
University of Rochester FS/LM Test Site	Reviewing Applications change	Apr 26, 2023	No date set

Applicants

Search by name, education, or status

Filter Saved Views ACTIONS

1 of 1 Applicants Shown.

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input checked="" type="checkbox"/> Jane Doe M.A. - Master of Arts, University of Rochester Complete	05/01/23 01:16 PM EDT			☆☆☆☆

READ EMAIL STATUS TAG + DISPOSITION CODE DOWNLOAD ARCHIVE

- To unarchive, click the Filter button above the list of applicants. Select “Yes” under “Archived” to filter the list to display only archived positions.
- Select the checkbox next to the desired applicant.
- On the red menu bar that appears, select “unarchive”

Applicants

Search by name, education, or status



Filter

Saved Views

COLUMNS

Archived Save Clear Filters

HIGHEST DEGREE EARNED:

 M.A. - Master of Arts

APPLICATION STATUS:

No choices available.

TAGS:

 strong publications

PROGRESS:

 Complete
 Incomplete

RATINGS:

My Rating

☆☆☆☆☆ No Rating

ARCHIVED:

 Yes No

Filter by Form Responses



2 Applicants Shown.

READ EMAIL STATUS TAG + DISPOSITION CODE DOWNLOAD UNARCHIVE

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input checked="" type="checkbox"/> Jane Doe M.A. - Master of Arts, University of Rochester Complete	05/01/23 01:16 PM EDT		⊕	☆☆☆☆☆



CLOSE POSITION

- Please follow the University of Rochester posting requirements guidelines for your school regarding the number of days a position must stay open.
- Please note that positions with applications attached to them can only be closed, not deleted.
- From the position page, click on “Position Actions” from the top right drop down menu and click “Close Position.”

Assistant Professor

Unit University of Rochester FS/LM Test Site	Status Reviewing Applications change	Opens Apr 26, 2023	Closes No date set
--------------------------------------------------------	----------------------------------------------------------------	------------------------------	------------------------------

Applicants

Search by name, education, or status

1 of 1 Applicants Shown.

<input type="checkbox"/>	Applicant Name ^	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/>	Jane Doe M.A. - Master of Arts, University of Rochester	05/01/23 01:16 PM EDT		<input type="checkbox"/>	☆☆☆☆


Complete

Position Actions dropdown menu:
Edit Position
View Committee
View Position Activity Log
View position details
View Referral Sources
Add New Applicant
Close Position

- Indicate if an applicant has been selected.
- If “yes” click on “+ Add Applicant”, select the desired applicant, and click “Close Position”
- If “no” add a note to document why no selection was made, and click “Close Position”

Closing Position

Was an applicant selected?

Yes 

No

Select Applicant(s)

You must select at least one applicant to continue.

REOPEN A CLOSED POSITION

- From the FIS home screen, click on “Positions” on the left menu

The screenshot shows the FIS home screen. On the left, a sidebar menu has 'Positions' highlighted with a green arrow. The main area is titled 'Positions' and features a search bar and a 'FILTER' button. Below is a table with the following data:

Position	Status	Application Information	EEO Notes
Assistant Professor University of Rochester Faculty ID:115085	Accepting Applications	0 applications Opens: Apr 26, 2023	Add

- Click on “Filter” and in the pop up window, select “Closed” in the “Active or Closed?” section.

The screenshot shows the 'Positions' page with the 'Filter' button highlighted by a green arrow. A 'Filters' pop-up window is open, showing the 'Active or Closed?' section with the 'Closed' radio button selected. The table below shows the filtered results:

Position	Status	Application Information
Assistant Professor University of Rochester Faculty ID:115085	Accepting Applications	0 applications Opens: Apr 26, 2023
Untitled Position AS&E Dean's Office Faculty ID:111826	-	1 applications Opens: Feb 17, 2023

- Click on the desired position to reopen.
- Click on “Position Actions” in the top right corner and click “Open Position”

Assistant Professor

The screenshot shows the 'Assistant Professor' position detail page. A message states: "This position is closed. To receive new applications for the position, or to allow committee members to review previous applicants, you must reopen the position." The 'Position Actions' menu is open, showing the 'Open Position' option highlighted. Below is a table with the following data:

Unit	Status	Opens	Closes
University of Rochester	Accepting Applications (Closed) change	Apr 26, 2023	No date set

For more information on managing a search, see Interfolio’s help site: https://product-help.interfolio.com/en_US/creating-and-managing-applications


When completing the 500 form once a candidate has been selected for hire, please include the Position ID #:

Positions + New Position

Search for positions

Q ≡ FILTER

Position ▾	Status ▾	Application Information ▾	EEO Notes
Assistant Professor University of Rochester Faculty ID:115085	Accepting Applications	0 applications Opens: Apr 26, 2023	Add



Click here for an in-depth training course on Faculty Search for Committee Managers:
<https://rise.articulate.com/share/zkESWoStzmxsj8TgJzv0XrRfCbQXmvG9#/>